



Filing ID #10025051

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Dr. Mark Green  
**Status:** Congressional Candidate  
**State/District:** TN07

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2018  
**Filing Date:** 01/25/2019  
**Period Covered:** 01/01/2017– 04/30/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
5 Stones Consulting [OL]	JT	\$500,001 - \$1,000,000	Boarding Horses	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Ashland City, Montgomery Co, TN, US DESCRIPTION: This is the entity through which our horse boarding operations are conducted.					
A Night With Saddam published by Lulu Press [IP]		\$1,001 - \$15,000	Royalties	\$201 - \$1,000	\$1 - \$200
Alianz Master Dex F Fixed Annuity [FN]		\$50,001 - \$100,000	Tax-Deferred		
Align MD [OL]		None	Capital Gains	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000
LOCATION: Clarksville/Montgomery Co, TN, US DESCRIPTION: Sale of 100% Ownership in Align MD to APP Hold Co payments over 3 years ending Nov 2017. Current value of ownership is none and payments to me are complete as of NOV 2017.					
APP Hold Co [PS]		None	Capital Gains	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000
DESCRIPTION: Sale of stock in a privately held company.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Authentically American Apparel [PS]	SP	\$100,001 - \$250,000	Dividends	None	None
DESCRIPTION: Apparel company in Brentwood, TN.					
AXA Retirement Account ⇒ AXA IRA Cash Account [IH]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Consumer Discretionary Select Sector SPDR [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares 10+ Year Credit Bond [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares 1-3 Yr Credit Bond [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares Core U S Aggregate Bond [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares IBOXX \$Investment Grade Corp Bond [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares MSCI France [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares MSCI Germany [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares MSCI Hong Kong [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares MSCI Japan [EF]		\$15,001 - \$50,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares MSCI Switzerland Capped [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares MSCI UTD Kingdom New [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares Russell 1000 [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AXA Retirement Account ⇒ Ishares Russell 2000 [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Ishares U S Trust Short Maturity Bond [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Sector Consumer Staples Select Sector SPDR [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Sector Energy Select Sector SPDR [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Sector Healthcare Select Sector SPDR [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Sector Materials Select Sector SPDR ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Sector Technology Select Sector SPDR [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Spdr Bloomberg Barclays Intl Treasury Bond [EF]		\$1,001 - \$15,000	Tax-Deferred		
AXA Retirement Account ⇒ Vanguard Telecom Services ETF [EF]		\$1 - \$1,000	Tax-Deferred		
Birch Creek Properties ⇒ Loans from Birch Creek to Colson Services [DO]	JT	\$500,001 - \$1,000,000	Interest, Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Birch Creek Properties ⇒ Rental Property [RP]  LOCATION: Ashland City, Montgomery Co, TN, US	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Birch Creek Properties ⇒ Rental Property [RP]  LOCATION: Clarksville, Montgomery Co, TN, US	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Birch Creek Properties ⇒	JT	\$250,001 -	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Westchester Properties [RE]		\$500,000			
DESCRIPTION: Rental properties in Nashville, TN.					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Capitol [RP]	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Carter [RP]	JT	\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Meadow [RP]	JT	\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Neelys' 1 [RP]	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Neelys 2 [RP]	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Anderson [RP]	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Grenada [RP]	JT	\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Kenmore [RP]	JT	\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Oakdale [RP]	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Nashville, TN, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Oneida [RP] LOCATION: Nashville, TN, US	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Porter [RP] LOCATION: Nashville, TN, US	JT	\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Richmond Hill [RP] LOCATION: Nashville, TN, US	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Westchester [RP] LOCATION: Nashville, TN, US	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
Colo-Labs Research Company Medical Lab Tests [PS] DESCRIPTION: Medical laboratory in Knoxville, TN.		\$50,001 - \$100,000	Dividends	None	None
Dia-Tech Oncology [PS] DESCRIPTION: Oncology services in Franklin, TN.		\$15,001 - \$50,000	Dividends	None	None
ETFIS SER TR I Infracap Active MLP [EF]		\$250,001 - \$500,000	Dividends	None	None
Franklin Conservative Allocation FD CL B [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Gold [CO]		\$1,001 - \$15,000	Capital Gains	None	None
Hytech [DO]	SP	\$100,001 - \$250,000	Interest	None	None
IRA Innovations Self Directed IRA ⇒ Cash Account [IH]		\$15,001 - \$50,000	Tax-Deferred		
IRA Innovations Self Directed IRA ⇒ Note Receivable from Colson Services [DO]		\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Loan to APP Hold Co [DO]		\$5,000,001 - \$25,000,000	Interest	None	None
Loan to Luke Stair [DO]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Midland Fixed Annuity IRA [FN]		\$1,001 - \$15,000	Tax-Deferred		
Northwestern Brokerage Investment Account Cash [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Oppenheimer Steelpath MLP Income CL A [EF]		\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	None
Rural Physician Partners PLLC [PS]		\$250,001 - \$500,000	Dividends	None	None
DESCRIPTION: Healthcare provider in Franklin, TN.					
Silver [CO]		\$1,001 - \$15,000	Capital Gains	None	None
State Farm Annuity [FN]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
State of TN 401(k) ⇒ Allianz NFJ Large Cap Value Instl [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ Brown Capital Small Company Inv [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ Columbia Mid Cap Value Instl [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ DFA International Value I [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ Fidelity International Discovery [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ Fidelity Puritan [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ Invesco Van Kampen Small Cap Value Y [MF]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
State of TN 401(k) ⇒ Vanguard Institutional Index I [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ Vanguard Total Bond Market Index Inst [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 401(k) ⇒ Voya Fixed Fund [MF]		\$1 - \$1,000	Tax-Deferred		
State of TN 457 Plan ⇒ Alliance NFJ Large Cap Value Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		
State of TN 457 Plan ⇒ Brown Capital Small Company Inv [MF]		\$1,001 - \$15,000	Tax-Deferred		
State of TN 457 Plan ⇒ Columbia Mid Cap Value Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		
State of TN 457 Plan ⇒ Fidelity International Discovery [MF]		\$1,001 - \$15,000	Tax-Deferred		
State of TN Consolidated Retirement System [FN]		\$15,001 - \$50,000	Tax-Deferred		
Visible Pictures LLC Movie Production Loan [DO]		\$100,001 - \$250,000	Interest	None	None

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of Tennessee	Salary	\$45,627.00	\$24,235.00
American Physician Partners (APP Hold Co)	Salary	\$75,000.00	\$275,000.00
Crossfit Solafide	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	F&M Bank	November 2017	Personal loan.	\$500,001 - \$1,000,000
	Republic Bank	OCT 2011	Loan on a rental property	\$100,001 - \$250,000
	Republic Bank	June 2012	Loan on Rental Property	\$50,001 - \$100,000
	Planters Bank	Dec 2015	Loan on Rental Property	\$15,001 - \$50,000
	Planters Bank	Dec 2015	Loan on Rental Property	\$15,001 - \$50,000
	Planters Bank	Dec 15	Loan on Rental Property	\$15,001 - \$50,000
	Planters Bank	Mar 2016	Loan on Rental Property	\$15,001 - \$50,000
	Republic Bank	June 2016	Loan on Rental Property	\$50,001 - \$100,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Division President	American Physician Partners
COMMENTS: Ended April 1, 2017.	
Director	Soldiers & Families Embraced
Director	Reboot for Recovery
President	Health Professions Insurance Company, LLC
President & CEO	Linden Risk Management LLC
President & CEO	5 Stones Consulting
Chairman of the Board	Bunker Labs
Director	Boy Scouts of America
President	Two Rivers Medical Foundation

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.



## SCHEDULE A ASSET CLASS DETAILS

- AXA Retirement Account
- Birch Creek Properties (100% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: This is a real estate investment entity with loans to other entities, properties that it rents to individuals, etc.
- Birch Creek Properties ⇒ Westchester Properties (26% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: This company rents individual houses, and small 2 - 4 unit town homes.
- IRA Innovations Self Directed IRA
- State of TN 401(k)
- State of TN 457 Plan

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Dr. Mark Green , 01/25/2019